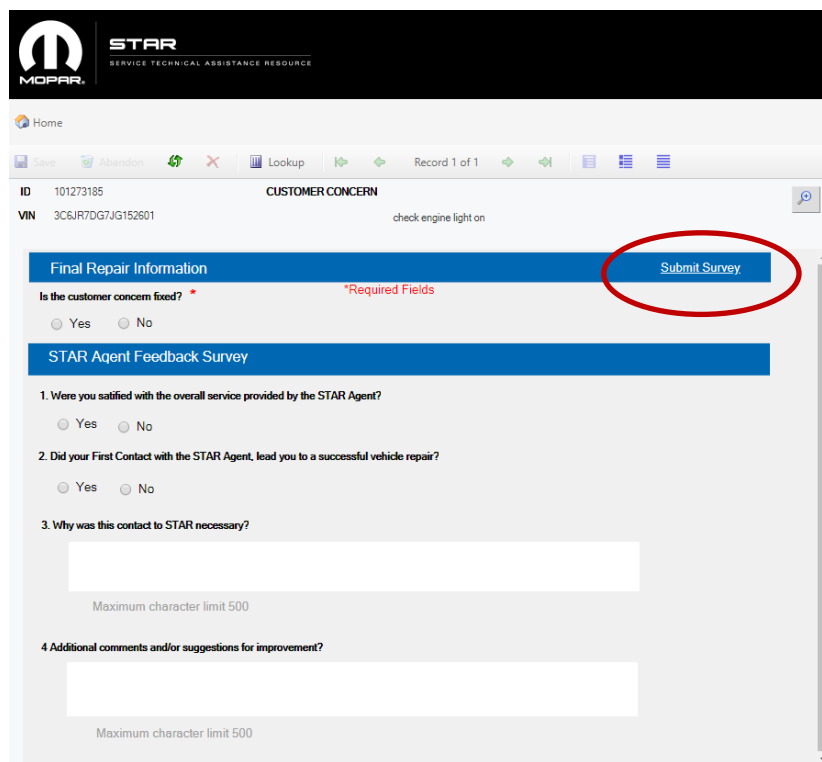## Closing a Case

- Upon selecting a case from his/her dashboard in Cherwell, the user will be directed to a Case Summary Page.
- Cases can be updated by clicking 'Edit' button on the Case Summary page.
- Once in "Edit" mode for a case, the options 'Request Case Closure' and 'Print Case' become available from this interface.
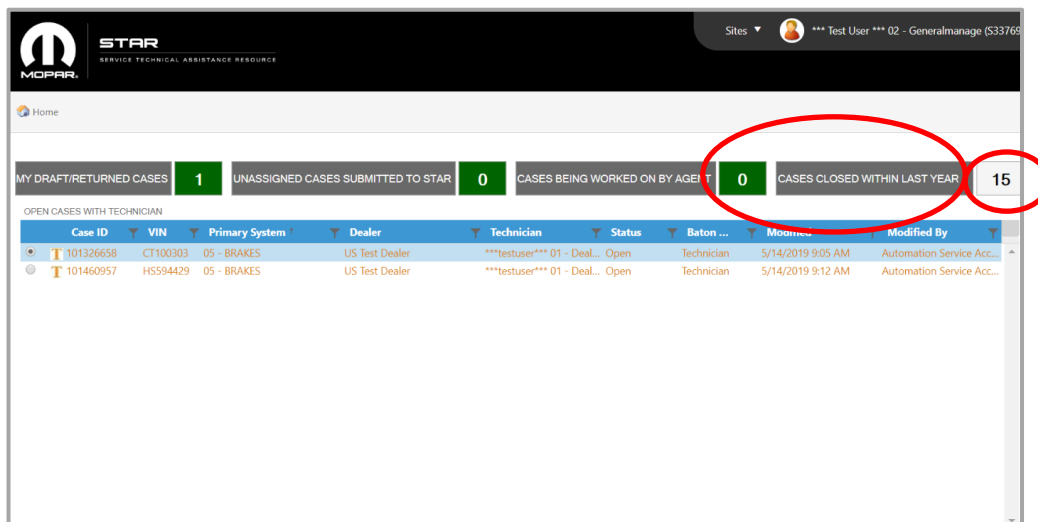

- Selecting "Request Case Closure" button notifies the STAR Agent that the vehicle concern has been resolved and the case can be closed.
  - o **Important:** Prior to selecting "Request Case Closure," Technician must enter/add vehicle resolution in **Conversation Notes**.
- Updates to the 'Conversation' box can be viewed in the central part of the case summary. At this point, the case will have already entered the STAR queue and will be picked up by a STAR Agent to close.
- After a Dealer Technician requests a case closure, s/he is automatically taken to a survey that requires completion. If a STAR Agent closes a case on his/her end, a survey will appear in the Technician Dashboard and will require completion.
- Once a survey is completed, a user must click **Submit Survey** link in upper-right of the survey.
  - o Simply saving the case will not submit the survey (this action will only save any recent changes) and the survey will remain in "Open" status until properly submitted via this link.

- Open surveys remain in a Technician's **Open Surveys** queue until completed and submitted.
- After a technician has completed a survey related to a technical assistance experience, the survey will appear in the **Completed Surveys** queue in his/her dashboard.

- Cases closed within the last year can be reviewed by accessing the **Closed Within Last Year** queue from a Technician's dashboard.
  - Click the number showing the amount of cases in the queue (to the right of the queue).
  - From list of case options, click on desired case number to view case details.

- Within 15 business days of a case being closed, a Technician can reopen a case by clicking **Reopen Case** button from case details page.
  - However, cases older than 15 days cannot be reopened; they can only be reviewed.